



Exercise Guide for

PA320

Maintain Warnings and Grievances

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1.1 – Walkthrough - Log on to SAP



Scenario

This introductory step is intended to familiarize the student with logging in to SAP.

Instructions

Follow along with your Instructor as they demonstrate how to log on to the system.

Field	Value
User ID	Use the computer ID assigned by your instructor
Password	Use the computer password assigned by your instructor
Client	Use the client assigned by your instructor

This exercise is complete.

1.3 - Exercise - Create a Warning Record


PA30

Scenario

The employee has a pattern of tardiness, where last month the employee was tardy a total of 6 days. The employee has been coached and has received a documented counseling session. So far this month, the pattern has continued with the following: 6th--15 min. late; 7th--30 min. late; 13th--30 min. late; 15th--45 min. late; 20th--15 min. late; and 22nd--1 hour late. The employee's supervisor has issued a written warning for personal conduct. The warning letter stated the record would be reviewed in three months to see if the employee had corrected the issue and maintained corrective action.

Instructions


Follow along with the Business Process Procedure (BPP) to complete the exercise scenario in the system.

1. Enter transaction code **PA30** in the command field and click .
2. Complete the following fields:

Field	Value
Personnel no	Use the employee located on your data sheet as assigned by your instructor.



3. Press **Enter** on the keyboard to display the employee's record. It is a best practice to always press Enter before you process an infotype. Pressing Enter allows you to see if the numerical codes you entered are correct.

Infotype	102 or Grievances NA
Subtype	3 or Disciplinary Warning




4. Press **Enter** on the keyboard to activate the infotype/subtype.
5. Click  (Create) to begin a new warning record. Observe that the infotype name begins with "Create".
6. Complete the following fields:


Start Date	Today's date minus one week
To	Start date plus 18 months
Subtype	3 (this field should populate from initial screen PA30)
Reason	Personal Conduct
Grievance Number	Leave blank

Date Entered	Today's date
Supervisor	800000610
Time From	Leave blank
Resolved at	Leave blank
Result	Leave blank
Data Settled	Leave blank
Estimated costs	Leave blank

7. Click  (Enter) to validate your changes. Pressing Enter allows you to see that the numerical codes you entered are correct.
8. Click  (Save) to save your changes. The Monitoring of Tasks (0019) screen is displayed.

Task Type	90 days
Date of Task	Start date + 90 days. Press Enter . Observe that the Reminder Date field automatically populated to a default time frame. Either highlight and change the date as applicable, or use the Lead/follow-up time fields.
Lead/follow-up time	2 weeks Lead time (-). Press Enter and observe that the Reminder Date field changed. Using this function overrides the default time frame and sets the reminder date for this task to the new timeframe.
Comments	<p>NOTE: Since the comments do not wrap at the end of the line, use the Edit > Maintain Text function located on the menu bar to add the comments below to the infotype. Remember to start any comments with your name and the date.</p> <p><your name, date> WW letter stated record would be reviewed in 90 days to see if tardiness has been corrected and maintained. Check w/supv. to see if record needs to be (delimited) or continued for the full 18 months allowed.</p>

9. Click  (Enter) to validate your comments.
10. Click  (Save) to save your comments.
11. Click  (Save) to save your changes.

12. Click  (Back) until you return to the SAP Easy Access screen.

Questions

Answer the following questions.

Question 1

What transaction code is used to maintain Warnings?

A

Question 2

What is meant by delimiting a record?

A

Question 3

What term is defined by the following statement? When a record is created, it must have a beginning or start date and an ending date, which is called a _____.

A

This exercise is complete.

1.5 – Exercise - Modify a Warning Record

PA30


Scenario

Correct the previous entry by changing warning entry from personal conduct to unsatisfactory job performance. Change/correct the written warning in PA30.

NOTE: Change will overwrite the previous data. There will not be a history of the previous action.

Instructions


Use the Business Process Procedure (BPP) to complete the exercise scenario.

1. Enter transaction code **PA30** in the command field and click .
2. Complete the following fields:




Field	Value
Personnel no	Use the employee located on your data sheet as assigned by your instructor. (Use the employee from your last exercise.)

3. Press **Enter** on the keyboard to display the employee's record. Pressing Enter allows you to see that the numerical codes you entered are correct.

Infotype	102 or Grievances NA
Subtype	3 - Warning

4. Press **Enter** on the keyboard to activate the infotype/subtype.
5. Click  (Change). Observe that the name of the infotype begins with "Change". By selecting Change, you are overriding (erasing) the previous error so there is no history if an error had been made.

Reason	01 – Unsat. Job Performance
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6. Click  (Enter) to validate your changes.
7. Save  the record. Verify that the change has been made by reading the prompt on the bottom left line of the screen. That message is: "Record changed."
8. Click  (Back) until you return to the SAP Easy Access screen.

This exercise is complete.

1.6 – Exercise - Display an Employee's Warnings


PA20

Scenario

A situation has arisen where you need to review an employee's record to display the historical record of any warnings that are associated with the employee.

Instructions


Follow along with the Business Process Procedure (BPP) to complete the exercise scenario in the system.

1. Enter transaction code **PA20** in the Command field and click .
2. Complete the following fields:

Field	Value
Personnel no	Use the employee located on your data sheet as assigned by your instructor (Use employee from the last exercise.)

3. Press **Enter** on the keyboard to display the employee's record. It is a best practice to always press Enter before you process an infotype. Pressing Enter allows you to see if the numerical codes you entered are correct.

Infotype	102 or Grievances NA
Subtype	3 or Disciplinary Warning. NOTE: To see grievances in addition to warnings, leave the Subtype field blank.

4. Press **Enter** on the keyboard to activate the infotype/subtype. Pressing Enter allows you to see if the numerical codes you entered are correct.
5. Use either Display or Overview to review the warnings associated with this employee.
6. Click  (Back) until you return to the SAP Easy Access screen.

Questions

Answer the following questions.

Question 1

What is an Infotype?

A

Question 2

Which Infotype is used to view or maintain warnings and grievances?

A

This exercise is complete.

1.8 - Exercise - Delimit a Warning Record

PA30


Scenario

The employee has requested to be reviewed for corrective behavior and has requested that the written warning letter be removed from her file. The Supervisor has requested that the warning be removed since the employee has maintained corrected behavior. Delimit the employee's written warning effective today.



NOTE: When you enter the delimit date, SAP automatically assumes the validity period should have ended the day before. Therefore, you must be careful to enter the correct date in order for the validity period to be correct.



Instructions

Use the Business Process Procedure (BPP) to complete the exercise scenario.




- Enter transaction code **PA30** in the Command field and click .
- Complete the following fields:

Field	Value
Personnel no	Use the employee located on your data sheet as assigned by your instructor. (Use the employee from your last exercise.)
Infotype	102 or Grievances NA
Subtype	3

- Press **Enter** on the keyboard to activate the infotype. It is a best practice to always press Enter before you process an infotype. Pressing Enter allows you to see if the numerical codes you entered are correct.
- Click  (Delimit). The Enter Delimitation Date pop-up window is displayed with the *current date* already populated. Change the delimit date if applicable.
NOTE: This popup only displays when you have exited the Maintain Employee Data screen. In your work environment, if you enter a different employee directly from this screen, you will not receive the delimit popup. In that case, you must ensure that you change both the Choose and Delimit dates as applicable on the Delimit Grievances screen.
- Change the date to three months from today.
- Click . The Information pop-up window displays indicating that the end date is set to 12/31/9999.

7. Click . The Delimit Grievances (0102) screen is displayed.
8. Review the Choose and Delimit dates to ensure they are both accurate and change if necessary.
9. Click the **gray square** to the left of the applicable warning to select the record.
10. Click  (Delimit). The Maintain Master Data screen is displayed with the system message that the record was delimited. Now you must delimit the Monitoring of Task infotype; otherwise, it will continue to appear on your Date Monitoring report until the original task date has passed.

Infotype	0019 or Monitoring of Tasks
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11. Press **Enter** on the keyboard to activate the infotype.
12. Make sure all is selected under the period section.
13. Click  (Delimit). The Delimit Monitoring of Tasks (0019) screen is displayed.
14. Click the **gray square** to the left of the task to select the record.
15. Click  (Delimit). The Maintain Master Data screen is displayed with the system message that the record was delimited.
16. Click  (Back) until you return to the SAP Easy Access screen.

Questions

Answer the following questions.

Question 1

What Infotype is used to delimit a warning record?

A

Question 2

When would we change a record verses creating one?

Question 3

Can an employee have multiple warnings with an end date of 12/31/9999?

A

This exercise is complete.

2.2 - Exercise - Create a Grievance Record

PA30

Scenario


A pre-disciplinary conference has been held and the employee has received a 3-day suspension without pay for receiving a speeding ticket while driving a state car.

NOTE: Grievance Maintainer will notify HR Maintainer because a Suspension Action must be executed on the employee.


NOTE: There are two options available for the Grievances infotype, the previous method (3-step, no mediation) and a new method (2-step, mediation is the first step). The 2-step method is considered to be a more streamlined process. It is an agency decision as to which method is used; however, the method that is chosen must be used agency wide. An agency cannot switch back and forth between the two methods.

Instructions

Use the Business Process Procedure (BPP) to complete the exercise scenario.



1. Enter transaction code **PA30** in the Command field and click .
2. Complete the following fields:

Field	Value
Personnel no	Use the employee located on your data sheet as assigned by your instructor.
Infotype	0102 or Grievances NA .





3. Press **Enter** on the keyboard to activate the infotype. Pressing Enter allows you to see that the numerical codes you entered are correct.
4. Click  (Create) to begin a new grievance record.
5. Complete the following fields.

Field	Value
Start date	Yesterday
Subtype	Grievance – 3-step no mediation (defaults)
Reason	DA – Suspense w/o Pay
Date entered	Today's date
Supervisor	Leave blank
Time from	Initial Filing

Field	Value
Resolved at	Step 1-3
Result	Leave blank
Date Settled	Leave blank
Estimated costs	Leave blank

6. Click  (Enter) to validate your changes.
7. Click  (Save) to save your changes. The Monitoring of Tasks (0019) screen is displayed.
8. Complete the following fields.

Task type	10 days
Date of task	Start date plus 10 days
Lead/follow-up time	3 Days
Comments	<p>NOTE: Since the comments do not wrap at the end of the line, use the Edit > Maintain Text function located on the menu bar to add the comments below to the infotype. Remember to start any comments with your name and the date.</p> <p><your name, date> The employee filed a grievance (at Step 1) requesting the 3-day suspension without pay be reduced to a written warning</p>

9. Click  (Enter) to validate your changes.
10. Click  (Save) to save your comments. You are returned to the Monitoring of Tasks screen.
11. Click  (Save) to save the record. The system prompt informs you that your record has been created.
12. Click  (Back) until you return to the SAP Easy Access screen.

This exercise is complete.

2.4– Exercise – Copy a Grievance Record with History

PA30

Scenario


Denied at Step 1 of the grievance process, the director (at step 2) agreed to reduce the 3-day suspension without pay to a written warning.

NOTE: Be sure to use the copy function to maintain the previous data. Change erases the previous data.


NOTE: Notify the HR Data Maintainer that the suspension has been reduced.

Instructions


Use the Business Process Procedure (BPP) to complete the exercise scenario.

- Enter transaction code **PA30** in the Command field and click .
- Complete the following fields:





Field	Value
Personnel no	Use the employee located on your data sheet as assigned by your instructor.
Infotype	0102 or Grievances NA .

- Press **Enter** on the keyboard to activate the infotype. Pressing Enter allows you to see if the numerical codes you entered are correct.
- Click  (Copy) to copy the previous grievance record.
- Update the following fields:

Field	Value
Start	Today's date
Subtype	Grievance – 3 step no mediation (defaults)
Reason	DA – Written warning
Date entered	Today's date
Supervisor	Leave blank
Time from	1-Step 2
Resolved at	Step 1 – 3
Result	Resolved prior FAD
Date settled	Yesterday's date
Estimated cost	Leave blank

6. Click  (Enter) to validate your changes.
7. From the menu, select **Edit > Maintain Text** and add a note documenting the reason for the change in the record.

Comments	<p>NOTE: Remember to start any comments with your name and the date.</p> <p><your name, date> At Step 2 the director agrees to reduce the 3-day suspension to a written warning.</p>
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8. Click  (Save) to save your comments.
9. Click  (Save) again to save the record itself.
10. Click  to cancel Infotype 19 Monitoring of Tasks since there is no need to monitor this task. The Maintain HR Master Data screen is displayed.
11. Click  (Back) until you return to the SAP Easy Access screen.

This exercise is complete.

2.6 – Exercise - Delimit a Grievance Record

PA30


Scenario

The employee grievance has been resolved. The Director has agreed to remove the 5 day suspension and back pay the employee.




NOTE: When you enter the delimit date, SAP automatically assumes the validity period should have ended the day before. Therefore, you must be careful to enter the correct date in order for the validity period to be correct.



Instructions

Update the Grievance record with the information supplied to complete the exercise scenario.

1. Enter transaction code **PA30** in the Command field and click .
2. Complete the following fields:

Field	Value
Personnel no	Use the employee located on your data sheet as assigned by your instructor.
Infotype	0102 or Grievances NA .

3. Press **Enter** on the keyboard to activate the infotype. Pressing Enter allows you to see if the numerical codes you entered are correct.
4. Click  (Delimit). The Enter Delimitation Date pop-up window is displayed with the current date already populated. Change the delimit date if applicable.
NOTE: This popup only displays when you have exited the Maintain Employee Data screen. In your work environment, if you enter a different employee directly from this screen, you will not receive the delimit popup. In that case, you must ensure that you change both the Choose and Delimit dates as applicable on the Delimit Grievances screen.
5. Enter tomorrow's date.
6. Click . The Information pop-up window displays indicating that the end date is set to 12/31/9999.
7. Click . The Delimit Grievances (0102) screen is displayed showing two records.
8. Click the **gray square** to the left of the DA-Written Warning record to select it.

9. Click  (Delimit). The Maintain Master Data screen is displayed with the system message that the record was delimited. In your work environment, you would normally delimit the Monitoring of Task infotype (just as you have done in previous exercises); otherwise, it will continue to appear on your Date Monitoring report until the original task date has passed. For this exercise, you do not need to delimit IT0019.
10. Click  (Back) until you return to the SAP Easy Access screen.

Questions

Answer the following questions.

Question 1

Other than delimiting this grievance, what other updates would need to be performed?

A

This exercise is complete.

2.8 – Exercise - Copy a Grievance Record


PA30

Scenario


An employee grievance escalated to the court for a final decision. The final decision has been documented and SAP needs to be updated. Display the grievance in SAP and make the final changes to finalize the grievance.

Instructions




Update the Grievance record with the information supplied to complete the exercise scenario.

1. Enter transaction code **PA30** in the Command field and click .
2. Complete the following fields:

Field	Value
Personnel no	Use the employee located on your data sheet as assigned by your instructor.
Infotype	0102 or Grievances NA

3. Press **Enter** on the keyboard to activate the infotype. Pressing Enter allows you to see if the numerical codes you entered are correct.
4. Click  (Copy) to copy the previous grievance record. The Copy Grievances NA (0102) screen is displayed.
5. Complete the following fields:

Field	Value
Start	Yesterday's date
To	Today's date
Subtype	Grievance – 2 step mediation is 1 st step (defaults)
Reason	Violation Fed Law
Date entered	Today's date
Supervisor	Accept the current supervisor number displayed
Time from	Court
Resolved at	Appeal to Court
Result	Court Decision
Date settled	Today's date
Estimated cost	Leave blank

6. Click  (Enter) to validate your changes.
7. Click  (Save) to save your changes. The system prompt informs you that your record has been created.
8. Click  (Cancel) to cancel the creation of Infotype Monitoring of Tasks (0019), since there is no need to monitor this task

This exercise is complete.